

## NEEDLE &amp; ROSENBERG

IMPORTANT FAX DOCUMENT

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DATE May 18, 2004  
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COMPANY U.S. Patent and Trademark Office  
FAX NUMBER 703-746-8305

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Please review and contact me at 678-420-9366 (DD) to discuss whether June 1 or June 2 works best for a personal interview.

## CONFIDENTIALITY NOTE

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**Meeting with Patent Examiners Hosain T. Alam/Thu Ha Nguyen**  
U.S. Patent and Trademark Office  
Wednesday, June 1 or 2, 2004

U.S. Patent Application No. 09/427,787  
N&R Reference: 22022.0004US

**AGENDA**

**DRAFT**  
**FOR GENERAL DISCUSSION  
PURPOSES ONLY**

- I. Introduction**
- II. Brief background of Yodlee, Inc. (patent application assignee)**
- III. The present patent application (09/427,787)**
  - a. The current set of patent claims
    - 1. "aggregating content associated with the end user by the host computer from one more more information providers"
      - a. meaning of "aggregating content" as defined in the specification
    - 2. Remaining limitations of the claims
  - b. Comparison to the prior art
    - Bakshi, U.S. Patent No. 6,345,300
      - 1. Stores *user-controlled parameters* as cookies
      - 2. This is not "content" as defined in the specification of the present patent application
      - 3. Discussion of other distinguishing features
  - c. Discussion of strategy for moving the patent application forward
- IV. Any other questions/comments from the Examiners**
- V. Conclusion**